

A Brief and Incomplete History of the CDI RFP Process

or, Where the CDI Coordinator attempts to understand our path to today's CDI funded projects

We are in the middle of the FY17 CDI Request for Proposals Process, with Phase 1 of community voting on Statements of Interest ending in a couple of days during the [November Monthly Meeting](#). Although some CDI members have been involved since funding of projects started in FY10, this is my first full cycle as the CDI coordinator, and it's been interesting digging into the archives of the [CDI wiki](#) and learning more about how this process has evolved.

One thing that is constant is that the **CDI Coordinators are perpetually trying to streamline and improve the process and attract proposals of better quality through clearer guidelines**. Of course we would love increasing numbers of proposals each year (I was pretty down in the dumps when we barely missed recruiting the same number of proposals as last year), but there is a threshold beyond which it is not realistic to ask the community to read and consider all statements of interest, and there's less motivation to enter a competition where the success rate is <15%. (Unless your very survival depends on it and you have no choice, which we hope is not the situation here, or, you are just a very competitive person, which is fine.)

Here are some highlights in a brief and definitely incomplete history of the USGS Community for Data Integration (née Council for Data Integration).

FY10:

- **High value opportunities related to data integration** were discussed at the September 2009 Council for Data Integration face to face meeting.
- The opportunities were organized into goals and objectives for three major opportunities, and funded by the ELT at approximately \$500,000:
 - ArcGIS Access to Corporate Databases
 - Framework for Loosely Coupling Models
 - Data Upload, Registry, and Access Tool

FY11:

- Proposals were generated at the Annual Workshop by CDI members.
- All seven proposals were funded.
- Guiding principles started to emerge from community discussions, including:
 - **The best focus for the CDI leadership team is on facilitating relationships within the community and interconnection between existing projects.** Trying to fund major development activities is not the best use of any available CDI funding.
 - The community needs to facilitate much more direct interaction between data practitioners and research scientists to make sure scientists know about available tools and methods and that technologists are focused on the highest priority problems
- Decided that it would be beneficial for CDI funded projects to produce both final report products and publicly released open source software

FY12:

- Proposals were developed by CDI Members at the face to face meeting in August 2011.
- Proposal development was continued in Working Groups and each project "belonged" to a working group.
- **The new CDI Science Support Framework** was used to guide CDI-funded projects, and to answer What is meant by Data Integration?
- 14 of 17 projects were approved by the CDI sponsors
- Project timeline of March (funds allocated) to September (deliverables due) established.

FY13:

- **First formal Bureau-wide Request for Proposals.**
- Proposals were divided into four categories related to the new CDI Science Support Framework.
 - a. Management, Policy, and Standards,
 - b. Computational Tools and Services,
 - c. Data and Information Assets,
 - d. Community Innovation.
- Proposals submitted as email attachment.
- 43 proposals were submitted and reviewed by 7 volunteer review panels. The proposal ranked #1 in each panel was funded, as well 3 proposals that were ranked #2 (total of 10 funded projects.)

FY14:

- **First 2-phase process with short Statements of Interest, then full proposals.**
- The four categories remained.
- **First use of UserVoice voting platform to capture the entire CDI community's votes and comments.**
- For each Category, CDI held open SOI Review Meetings to discuss the SOIs and voting results.
- Phase 2 review panelists were anonymous.
- **A percentage of funds were reserved for emerging priorities.** The CDI Executive Sponsor could select high value projects in addition to the community and panel selections.
- First use of the online proposal management system.

- 64 Statements of Interest received (still had the “Be sure to read all SOIs before finalizing your votes.” statement), 9 projects funded.

FY15:

- Eliminated category approach, so that projects are all evaluated in a single group and those that are the best can be identified, whatever the category.
- There was a voting Opening Session, explaining voting procedures to the community.
- **Higher weighting for proposals that impact beyond a single MA or Program.**
- Included time in the SOI phase for internal review by CDI coordinators to identify opportunities for collaboration and linkages, before opening the vote to the Community.
- 39 Statements of Interest received, 11 projects funded.

FY16:

- **Phase 1 included optional supplemental Statements of Interest Media** (slides, video) to explain projects. This was discontinued in FY17 because of lack of evidence that this improved the voting process.
- 33 Statements of Interest received, 13 projects funded.

Here in FY17, we've reached a somewhat stable process. Small modifications continue to be made to the online RFP manager. We are also re-evaluating the timeline (very tight for most projects) and **brainstorming how to improve communication about the RFP process to the wider community and new members. Suggestions taken at cdi@usgs.gov!**

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